



2014 Self-Funded Health Plan Survey Instructions

General Information

- 2014 Self-Funded Health Plan Survey is Due **6/1/2015**
- Please complete the survey electronically online on the DOI website.
- If no self-funded health plans were administered for Idaho residents in 2014, please submit the online form leaving all fields as "0".
- Contact information should identify the individual for point of contact if the Idaho DOI has questions about the survey.
- Report dollar amounts and numerical counts accurately using whole numbers.

Specific health related or administrative questions on the survey should be directed to Healthsurvey@doi.idaho.gov. Any other questions should be directed to:

Kathy McGill – 208-334-4300; email kathy.mcgill@doi.idaho.gov.

Or

Scott Frost – 208-334-4277; email scott.frost@doi.idaho.gov.

Product | Administrative

Definition of Row Headings

- **Administrative Services Contract** – Administrative services for a self-funded employer, association or other entity's health plan, in which claims are paid from the insurer's own bank account and the insurer subsequently receives reimbursement from the self-funded entity.

- **Administrative Services Only** – Administrative services for a self-funded employer, association or other entity's health plan in which claims are paid from a bank account owned and funded directly by a self-funded entity or claims are paid from a bank account owned by the administrator but only after receiving funds from the self-funded entity.
- **Stop Loss/Excess** – Coverage purchased by a self-funded entity (such as an employer, association or trust) to cover hospital, medical or surgical expenses in excess of a specified amount.

Definition of Column Headings

Regarding administrative services

- **Earned Premium** – Earned premiums during the reporting year. (Stop loss/excess only)
- **Individuals Covered End of Year** – Number of people covered under policies in force on December 31 of the reporting year including those Idahoans covered under an employer, trust or association policy in force in another state and either a Certificate of coverage or summary of benefits is delivered in Idaho by mail, online services or other non-traditional means. For example, a family policy covering two parents and two children would count as four individuals covered and an employer health plan that covers 25 employees, 20 spouses and 20 children would count as 65 individuals covered (1 policy).
- **New Plans Issued During the Year** – Number of plans newly established during the reporting period.
- **Plans In Force End of Year** – Number of policies in force on December 31 of the reporting year. In the case of employer, trust or association health coverage, if no policies are in force in Idaho, but individuals in Idaho are covered under an employer, trust or association policy in force in another state, record the number of policies in force covering one or more Idahoans.
- **Plans Terminated During the Year** – Number of plans terminated during the reporting year.

Other Self-Funded Plan Data

- **Group Policy** – A contract of health insurance made with an employer or other entity that covers a group of persons as a single unit as the policyholder. It is not individual health coverage which is issued or delivered in Idaho for coverage, including out-of-state master policies where certificated of insurance are issued or delivered to Idaho residents.
- **Individual Policy** – A policy which provides protection to the policyholder and/or their family and which is not employment related.
- **Total # Covered Lives as of December 31st** – For the purposes of this inquiry the term covered lives includes:
 - **Persons covered under a group health insurance policy evidenced by a certificate of insurance where the certificate of insurance is issued or delivered in and renewed in Idaho, or issued or delivered and renewed in another state and covering Idaho residents.**
 - **Persons covered under an individual health insurance policy or group health insurance policy issued or delivered in and renewed in Idaho, or issued or delivered and renewed in another state and covering Idaho residents.**

- **Persons protected, in part, by a group excess loss insurance policy or stop loss coverage where the policy or certificate of coverage has been issued or delivered in and renewed in Idaho, or issued or delivered and renewed in another state and covering Idaho residents.**
- **Total # Member Months** – The sum of the number of covered lives on a specified day of each month during the calendar year, (i.e., determines the number of covered lives on a particular day in each of the 12 months and adds together).